



## PROJECT SCOPE STATEMENT

**Note:** Any work not explicitly included in the *Project Scope Statement* is implicitly excluded from the project.

<b>Project Name:</b>	BI - IT Governance
<b>Prepared by:</b>	Amy Winkel
<b>Date:</b>	12/20/2010

<b>Version History</b> (insert rows as needed):		
<b>Version</b>	<b>Date</b> (MM/DD/YYYY)	<b>Comments</b>
1.0	12/20/2010	Draft

## 1. Executive Summary

Provide below a brief overview of this project (e.g., project purpose and justification):

The IT Governance and Installation project is part of the overall University of Minnesota BI Implementation Program. The purpose of this project is two-fold:

- 1) Manage the installation/configuration of all hardware and software needed to deploy the production level instances.
  - Central / Distributed architectural design document created
  - Security model determined
  - PSSA/DBA processes designed
  - Configuration of servers documented
  - System admin and system DBA processes designed
  - Disaster Recovery Plan designed
  - Common Good Service/SLAs documented and available for use by additional units
  
- 2) Identify and document all relevant IT Governance and SDLC practices, policies, and processes required for central and distributed creation of content - reports/dashboards and data. Process oversight will be required at the following integration points:
  - Enterprise Data Warehouse (EDW)
    - Central / Shared
    - Private
  - Data Models and RPDs
    - Central / Shared
    - Private
  - Presentation Layer (reports and dashboards)
    - Central / Shared
    - Private

Provide a brief project summary in the space below. This information may be available in the Project Charter. Also provide a link to the *Project Charter* for reference.

[Link To Project Charter](#)

**Note:** In any instance where there is a discrepancy between the *Project Charter* and the *Project Scope Statement*, the latter is considered authoritative.

## 2. Business Objectives

### 2.1 Product Description (Solution):

OIT has committed to provide to the University community at large with an expanded Enterprise Data Warehouse (EDW) as its central data repository and the OBIEE tool set for business intelligence applications.

### 2.2 Business Objectives:

## 2. Business Objectives

Install and configure purchased tools. Identify and document technical and non-technical processes, practices, and policies needed for Business Intelligence system oversight.

## 3. Project Description

*For each area below, provide sufficient detail to define this project adequately:*

### 3.1 Project Scope -

**Includes (list Deliverables):**

### 3. Project Description

- 1) Manage the installation/configuration of all hardware and software needed to deploy the production level instances.
  - Central / Distributed architectural design document created
  - Security model determined
  - PSSA/DBA processes designed
  - Configuration of servers documented
  - System admin and system DBA processes designed
  - Disaster Recovery Plan designed
  - Common Good Service/SLAs documented and available for use by additional units

Identify and define processes/documentation/plan needed for BI hardware and software support.

- 2) Identify and document all relevant SDLC processes required for development, migration, and access to central and distributed creation of content - reports/dashboards and data. Process oversight will be required at the following integration points:

Enterprise Data Warehouse (EDW)

- Central / Shared
- Private

Data Models and RPDs

- Central / Shared
- Private

Presentation Layer (reports and dashboards)

- Central / Shared
- Private

For the each integration point, a list of business processes will be identified and cataloged. For each relevant business process - the following deliverables will be created:

- As – Is process flow documented
- Requirements analysis completed
- Fit Gap analysis completed
- To – Be process flow designed and documented

**Does Not Include:**

- Training Plan – will be covered by Pilot Project plan
- Pilot Installaton – will be covered by Pilot Project plan

**3.2 Project Completion Criteria:**

Processes are cataloged, To-Be process flow is complete, Process is approved and implemented.

**3.3 External Dependencies:**

### 3. Project Description

**3.4 Assumptions:** Knowledge gained from the analysis – discovery – implementation phases of the Financial Pilot project will be leveraged to determine the infrastructure needs of the production instances.

**3.5 Constraints:**

Security models for OBIEE implementation are complicated and integrated through-out the entire system. Current OIT staff do not have the expertise (or time to acquire the expertise) to explore – design – implement a fully integrated design model. Success of implementation will be linked to the security model that is developed. Consulting help would mitigate the risk involved with not adequately understanding the security system design needs for implementation.

Project Team understanding of the BI toolset and model. The BI model is complex and will be a new domain for analysts to understand. Current OIT staff who are familiar with the BI tools may be assigned to work on the Pilot and therefore not readily available for analysis needed for the IT Governance Project.

Installation/configuration of production instances will happen after Pilot Project implementation.  
Identification of appropriate group or person(s) to approve To – Be process flow.

### 4. Project Milestones

**Estimated Schedules – List key project milestones relative to project start. (Insert rows as needed)**

Project Milestone	Target Date (MM/DD/YYYY)
• Project Start	1/3/2011
• Production level instances installed and configured	3/31/2011
• OIA process documentation completed	5/13/2011
• Enterprise Data Warehouse – SDLC process documentation complete	5/13/2011
• RPDs and Data Models – SDLC process documentation complete	5/13/2011
• Presentation Layer – SDLC process documentation complete	5/13/2011
• Project Complete	6/31/2011

### 5. Project Approach

**5.1 Primary Plans - Will the project have formal written plans – i.e., project schedule, budget, quality, risk, etc.? Describe briefly in the space below:**

This project will have the following formal plans:  
Project schedule

## 5. Project Approach

### 5.2 Scheduled Status Meetings (Insert rows as needed):

Meeting	Purpose	Frequency
Project Team	Updates, work assignments, information sharing, knowledge transfer, escalate issues to proper group for resolution	weekly
Individual Team Members	Monitor work assignments, provide guidance and feed -back, mitigate risk of not completing tasks, escalate issues to proper group for resolution	As needed

### 5.3 Scheduled Status Reports (Insert rows as needed):

Report	Purpose	Frequency
Project Team Update	Provide status of work for Program Management Team .	weekly
Project Communications	To inform designated University members of project status.	As needed

Briefly describe how each of the following will be handled. Provide links to relevant documents as appropriate. Modify example text provided or enter your own.

#### 5.4 Issue Management:

- Project-related issues will be tracked, prioritized, assigned, resolved, and communicated in accordance with the *Project Management Methodology*.
- Issues will be reported using an [Issue Report Form](#). Issue descriptions, owners, resolution and status will be maintained in an [Issues Log](#) in a standard format.
- Issues will be addressed with the project owner and communicated in the project weekly status report.



## 5. Project Approach

<b>5.5 Change Management:</b>	<p>The change control procedures as documented in the BI Implementation Program - Change Management Plan will be consistent with the Project Management Methodology and consist of the following processes:</p> <ul style="list-style-type: none"><li>▪ A <a href="#">Change Request Log</a> will be established by the Project Manager to track all changes associated with the project effort.</li><li>▪ All Change Requests submitted via <a href="#">Change Request Form</a> will be assessed to determine possible alternatives and costs.</li><li>▪ Change Requests will be reviewed and approved by the project owner.</li><li>▪ The effects of approved Change Requests on the scope and schedule of the project will be reflected in updates to the Project Plan.</li><li>▪ The Change Request Log will be updated to reflect current status of Change Requests.</li></ul>
<b>5.6 Communication Management:</b>	<p>The following strategies have been established to promote effective communication within and about this project. Specific Communication policies will be documented in the BI Implementation Program Communication Plan.</p> <ul style="list-style-type: none"><li>• The Project Manager will present project status to the project Sponsors on a weekly basis; however, <i>ad hoc</i> meetings will be established at the Project Manager's discretion as issues or change control items arise.</li><li>▪ The Project Manager will provide a written status report to the project Sponsors on a monthly basis and distribute the Project Team meeting minutes.</li><li>▪ The project Sponsors will be notified via e-mail of all urgent issues. Issue notification will include time constraints, and impacts, which will identify the urgency of the request for service.</li><li>▪ The Project Team will have weekly update/status meetings to review completed tasks and determine current work priorities. Minutes will be produced from all meetings.</li><li>▪ All electronic Project Documents will be maintained in central storage accessible by all project stakeholders.</li></ul>
<b>5.7 Procurement Management:</b>	<ul style="list-style-type: none"><li>▪ Hardware and software procurement will be managed separately by OIT's Business Intelligence App Dev Team. A plan is in place for procurement of the required hardware and software.</li></ul>



## 5. Project Approach

<b>5.8 Resource Management:</b>	<p>The project team will produce a Resource Management Plan that will document the following:</p> <ul style="list-style-type: none"> <li>• Lists all major goods and services required in the project along with cost estimates and quality information.</li> <li>• Indicates which goods and services will be obtained from sources outside the Organization</li> <li>• Indicates who is assigned to the project and when.</li> </ul>
<b>5.9 Post Production Support</b>	<p>Part of the IT Governance processes will be to determine a production support process. An <b>interim plan</b> will be determined - to last for a period of xxxxx after go live. Changes to the interim plan may be needed as additional decentralized content is added, data governance policies and procedures are determined, and appropriate units for production support are identified.</p>

## 6. Authorizations *(Modify lists as needed)*

**The Scope Statement, WBS, Project Schedule, Risk Management Plan and Project Budget are approved by the:**

- BI Program Manager (Sharon Ramallo and Joe Sullivan)

**Project performance baseline changes will be approved by the:**

- BI Program Manager (Sharon Ramallo and Joe Sullivan)

**Project deliverables will be approved/accepted by the:**

- BI Program Manager (Sharon Ramallo and Joe Sullivan)
- ? OIT/ Decentralized group approvals? (OIA Sr managers? BI Decentralized Group?)

**Specific task responsibilities of project resources will be defined in the *Responsibility Assignment Matrix*.**

## 7. Project Scope Statement Approval / Signatures

<b>Project Name:</b>	BI - IT Governance
<b>Project Manager:</b>	Amy Winkel
<p><i>The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement among the Project Manager, Project Sponsors and Owners with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.</i></p>	
<p><b><i>I have reviewed the information contained in this Project Scope Statement and agree:</i></b></p>	





## 7. Project Scope Statement Approval / Signatures

Name	Role	Signature	Date (MM/DD/YYYY)

*The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Scope Statement document.*